

# Components of a Technology Plan

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Technology has afforded legal services an opportunity to expand services to more clients and to rethink, redefine, and upgrade traditional delivery systems. To be successful, technology planning needs to be a component of a vision for the delivery of legal services. Technology does not stand outside of a state's vision for how to best serve clients; but it can redefine traditional methods and models and encourage us to think outside the box.

## **Step 1: Define Your Vision**

A vision is your destination. It is the thing you want to accomplish. It may seem simple but to clearly articulate your vision in a single sentence is a critical first step – it is the way to establish the “dream” and recruit supporters and partners.

A common mistake is to articulate a vision that is driven by a particular technology – hardware or software – rather than a goal of reaching or improving legal services and access to legal services. To avoid this pitfall, ensure your planning process involves many non-techie partners. Staff, management, and board members should all have a say in establishing the vision. Participation breeds ownership.

## **Step 2: Defining the Partners and Principle Players**

Who does it take to make your vision a reality? Of course you should start with the people you already work and plan with. But also consider people from unusual sources outside your normal “A” List folks.

**Who are the right folks?** You must have a critical mass of people who can move a process forward and make final decisions in order for a statewide vision to become a reality. This means you need to involve decision makers high enough up on the chain of command to commit their organizations in terms of resources; time, money, and staff. When thinking of whom to include, determine who is most able to make budgetary decisions on behalf of the program.

## **What constituencies could a planning process engage?**

- State Support
- Legal Services Directors, Staff
- Board members of Legal Services Programs

(A note on Board members: It is advisable to meet with them one-on-one and funnel feedback into the process so they are included early on and not asked at the end of the process to participate.)

- Pro Bono Directors
- Law School Directors
- Law Libraries
- Judiciary, State Courts, Court Facilitators
- State Bar

- Paralegal Associations
- Vocal Minority of Staff from Programs (While challenging, it is a good idea to include some of the vocal minority who fear technology will needlessly going to reduce jobs or quality, cost too much money)
- Non-legal services Partners
- Funders, IOLTA directors
- Field program staff and directors

Make a list of whom you would like to see develop your vision. If you don't have a specific name, list job titles: chief justice of Supreme Court, executive director of IOLTA program, IT professors from local university, etc.

If you want to include more staff input (and not involve all staff), consider surveying them. Solicit input directly about what they want; what works; what doesn't; what would they like to have that don't now. This is a good way to include staff, limit the size of the tech planning group, and most importantly spot issues that may arise on the committee later.

**What can go wrong?** When a critical mass of decision-makers are not present at the technology planning table, key members often opt out of participation when it starts to look and feel too "geeky." Make sure the decision-makers at the table. Take the meetings to them if they won't attend outright – keep them informed.

### **Step 3: Articulate the Goals and Strategies that Support the Vision**

With the vision articulated, the planning committee should be able to discuss specific goals and strategies that are specific and measurable, to achieve the vision.

**Sample Mission of Tech Planning Committee:** Develop, oversee implementation of, and coordinate relevant technology plans and initiatives to fulfill the vision.

**Sample Vision:** Ensure access for low and moderate-income residents to the civil justice system through high quality legal services and self-help opportunities.

### **Sample Goals:**

1. Achieve technology equity among legal services and pro bono programs to enable all staff to have access to same resources and most effectively serve clients.
2. Increase capacity of infrastructure to provide equal opportunities to access legal services for rural clients.
3. Increase *pro bono* opportunities in rural communities.
4. Increase number of attorney hours spent on representation by improving efficiencies of case acceptance criteria and intake delivery systems.
5. Increase staff productivity and reduce frustration with technology that isn't working well (e.g. couldn't use case management or computer or phone system). Reduce time spent by all programs managing redundant technologies.

6. Create opportunities for clients who never enter legal assistance circles to access needed legal services from more portals and points of entry via technology.
7. Creating a stable platform from which our delivery systems and legal services can grow and expand with changing technologies.

### **Sample Strategies**

1. Tech Equity: Ensure a standard level of a personal computer that is linked to a printer, with desktop email capabilities and access to the Internet is available on every advocate's desk.

Once your committee has defined its expectations clearly, it can develop or approve an implementation plan that delivers the goals in a phased approach by stating priorities and expected timeline.

### **Step 4: Define the Resources Necessary to Support the Vision**

There are two types of resources needed to support tech planning efforts: staffing and money.

**What are Staffing Options and Considerations?** Someone assigned to implement, coordinate, and lead the effort is critical to success. There are many staffing options: full-time devoted staff support to planning and implementation; part-time staff support; in-kind support.

Likewise, there are staffing considerations in implementing the technology. Full consideration is needed when deciding whether or not to outsource the technology services and maintenance or whether a planning committee elects to build the systems and have the technology expertise in-house.

Generally in larger organizations, it might be more cost effective to outsource, given the number and type of technologies included and the geographic area to be covered.

**Money and Fundraising** To sustain planning and implementation of tech efforts, technology costs will need to be folded into every grant written. Technology is considered a part of every solution. Exploit the infrastructure you created; use your partnerships to generate support for projects. Also, consider pooling resources; shared infrastructure reduces duplication and enhances cost effectiveness

### **Step 5: Get Support During the Planning**

Planning for technology takes effort and energy. It demands attention and someone to act as a mobilizing force for the committee to move things forward, develop a written plan, and remove barriers. If you need help, or if your committee is log-jammed, seek help. (Contact National Technology Assistance Project or other consultants.)

**A Note on Vendors:** Once you established a tech committee, it might seem appropriate to bring in several vendors to help your group determine best options. Often however,

this has led to a committee adopting a salesperson instead of figuring out what they needed. It can result in installing systems that don't work or are inappropriate for the ultimate needs. If you do contract with a vendor, make sure you have taken precautions against disasters and other reasons for recovery.